DOCUMENT RESUME

ED 172 033 CE 022 161

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TITLE Mechanisms Facilitating Career Mobility at Tektronix, Inc.
INSTITUTION Technical Education Research Center, Cambridge, Mass.
SPONS AGENCY Bureau of Occupational and Adult Education (DHEW/OE), Washington, D.C.
BUREAU NO 498AH60279
PUB DATE Nov 77
GRANT G007605051
NOTE 47p.; For related documents see CE 021 875, CE 022 116, CE 022 162-165

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS Adult Counseling; *Career Change; Career Choice; Career Education; Career Opportunities; *Career Planning; Change Strategies; Employment Opportunities; Employment Services; Job Placement; Job Search Methods; Occupational Choice; *Occupational Guidance; Occupational Information; *Occupational Mobility; Training; Vocational Counseling; Vocational Retraining
IDENTIFIERS *Tektronix Inc

ABSTRACT

This case history describes the Tektronix, Inc. program of career fulfillment for its 11,000 employees. The study is divided into seven major sections. The first four sections deal with the purpose and philosophy of the program, history and company culture, organizational structure and staff, funding and resources. The fifth section presents mechanisms facilitating employee career mobility. Included in these are the following formal and informal components: (1) traditional informal career discussions with the employee's manager or equivalent; (2) pilot programs to make career counseling more formal and accessible to employees; (3) formal education and training offerings, as well as educational counseling; and (4) an expanded job posting system. The sixth section contains examples of nine career changers at Tektronix. The final section discusses future possibilities for increased employee career change options. (LRA)

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MECHANISMS FACILITATING CAREER MOBILITY AT TEKTRONIX, INC.

by Paul Ferrini

November, 1977

This case describes the long standing commitment of Tektronix, Inc. to the career fulfillment of its employees. Beginning as a small firm with a high degree of employee interaction at all levels, Tektronix has sought to maintain an open communication system whereby employees can articulate and act on their career needs. An extensive job posting system, career and life planning courses and workshops, and a full scale education and training program combine to provide some 11,000 employees with numerous options for career satisfaction.

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1.0 PURPOSE AND PHILOSOPHY

The purpose of the mechanisms for career mobility at Tektronix, Inc. is to provide each employee with the opportunity to realize his or her potential within the Company. Since its founding, the Company has maintained and validated the assumption that the more responsive an organization is to the needs of its members the more stable and productive that organization will be. As a result, the paramount concern at Tektronix is to foster an environment in which the individual employee feels him or herself as a vital resource to the Company and has confidence in the ability of the organization to accommodate the individual's changing needs.

Employees who have worked in the Company long enough to have experienced several job changes evidence an unusual attitude about career change. Job changes, no matter how radical they may be, are the norm at Tektronix; but career change is a phenomenon that makes little sense to many longstanding employees. For them, Tektronix is itself a career, one that includes a diversity of functions and responsibilities to be sure, but also one that continually emphasizes the value of each employee as a contributor to the productivity of the organization.

Because Tektronix is a profit-sharing firm encouraging creativity and responsibility in its employees, each individual believes and expects that whatever contribution he or she makes to the Company will return to him or her in full measure. It is in this context that mechanisms encouraging employee career mobility emerge as a vital part of the Tektronix experience.

2.0 HISTORY AND COMPANY CULTURE

Tektronix was established in 1946 by Howard Vollum and Jack Murdock, both ex-servicemen committed to technological excellence and humanistic values. When the company built its first oscilloscope the following year, it was a small business employing a couple hundred persons. Although Murdock and Vollum were progressive in their attempt to make Tektronix as democratic a company as possible, their effort was not unique for a business of this size. However, after 1950, Tektronix ceased to be a small business venture. The Company's reputation quickly grew, its markets expanded, and its workforce increased in kind.

Today, Tektronix is a world wide organization, employing some 11,000 persons in its home plant in Beaverton, Oregon and 4,000 others in numerous U. S. cities and foreign countries. The Company is now clearly recognized as the world's leading manufacturer of oscilloscopes, cathode-ray tube display systems and other electronic measurement tools.

In spite of Tektronix's rapid growth, the Company has continued to implement and expand its progressive approach to employee development. The more sophisticated mechanisms encouraging employee career mobility are clearly outgrowths of longstanding policies. The job posting system, for example, has been active for many years. Up until 1976, however, jobs were posted on bulletin boards throughout the company. This particular method of posting resulted in some 50 job changes per week. Still, there were indications ·

that more employees would use the system if they had easier access to it. As a result, last year the Company began publishing a special weekly newspaper containing all job openings. The papers began going so fast that it was necessary to print as many copies as there were employees in the firm. Now, there are very few employees who do not consult the job postings on a regular basis, and the number of people moving to new jobs within the Company has increased from the earlier figure of 50 per week to 300 per week.

A similar growth pattern can be seen in Tektronix's Education and Training programs. In 1957, Tektronix began offering tuition refunds for scientific courses. This policy expanded to include all job relevant courses and, by the middle sixties, the Company had developed an extensive in house training program. Five years later, Tektronix added to its educational program once again, bringing in several higher educational institutions to offer degree programs at the worksite. By the end of the 1976-1977 fiscal year, Education and Training recorded over 11,000 course completions in the voluntary after-hours program alone. More than 7,000 individuals took one or more courses, not to mention those employees who participated in O.J.T. courses and other on-company-time training.

These two examples reflect not only an impressive expansion of seminal Tektronix programs, but an overwhelming degree of employee participation in self and career development opportunities. One of the key goals we identified when Tektronix was chosen for an on-site visit was to determine why Tektronix employees exhibit such a high degree of commitment to their own development.

One reason for this phenomenon is clearly the company culture, which assumes that career development is the norm for all employees. The employee who stays in the same job for ten or fifteen years is clearly the exception at Tektronix. Managers at Tektronix know this and support career development as a matter of course. In fact most managers, as well as high level administrators, have experienced a variety of job changes in their careers at Tektronix and know that the continued success of the Company depends on the leadership qualities generated in those individuals who acquire a wide range of Company experiences.

Another aspect of this Company culture which encourages career mobility is the overall job security experienced by employees who desire to move within the Company. It is unusual for an employee, especially one with several years of Company experience, to be fired or laid off from a job at Tektronix. Any employee who has been performing on his or her job is seen as a valuable resource. And, should that employee desire to move to a different job within the Company, such a movement would be viewed as a gain for the Company. Rarely would an employee preparing or applying for a different job be made to feel that his or her present job would be placed in jeopardy. In fact, it can be said that once an employee establishes a good work record that employee can be assured of a career with Tektronix; that career usually involving a variety of jobs and responsibilities.

Perhaps the greatest test to the reality of job security at Tektronix came during the economic recession of the early 1970s, when many other high technology firms laid off large percentages

of their workforces. Previous to the recession, Tektronix decided on several occasions to shut down operations completely for a week at a time, rather than lay off any of its employees. Just as employees share the benefits of economic prosperity at Tektronix, it was felt that, whenever possible, periods of economic decline should be shared by all employees. In August, 1971, however, Tektronix was forced to lay off 350 employees, the only lay-off in the Company's history.

The manner in which the Company dealt with this cutback in its workforce provides an excellent example of why Tektronix employees have confidence in their employer. All employees who would be affected by the cut-back were informed one week in advance of the lay-offs and given three weeks pay. A full scale re-employment program was established, in which the Company identified 500 outside jobs for the 350 persons to be laid off. All employees accrued length of service during the layoff. Then, in March, 1972, when the impact of the recession began to subside, the Company offered all those employees who had been laid off an opportunity to return to employment at Tektronix. Sixty percent of the 350 displaced workers elected to return to the Company.

The mutual confidence between employee and employer is further exemplified by the informality and flexibility of the work environment. From the Company's inception, all employees, regardless of

their job titles, were addressed on a first name basis. That practice continues without exception. Even the President and the Chairman of the Board are known by all employees we talked with as Earl and Howard respectively. In fact, there was an unexpected lack of contrast between the decor and personal space afforded employees working in production areas and those working in the corporate office. In walking through many of the 25 buildings on the 300-acre industrial park, we saw no personal offices. Everyone seemed to have the same degree of accessibility. The one large conference room in the corporate building was used equally if not more as a classroom than as a corporate meeting room. From the president's desk, it was just a short walk to the lunchroom, which was a replica of others in production and technical areas, or to the circuit board design area, where we interviewed employees.

Working hours seemed to be as flexible and as equitable as the physical work environment. It was no exception for an employee to arrange with a manager to come in early or late on a day when the employee had a medical appointment or a class to attend. As long as an employee worked the number of hours expected and did not inconvenience co-workers, scheduling of work hours was simply up to the employee and the manager. All employees at Tektronix submit their own hours. And this is just one example of the honor system which has been a central policy at Tektronix throughout its history. Employees feel free to take coffee breaks when they reach a natural breaking point in their work, and at any time during the day there will be small groups of employees in the lunchroom, making their own change from open cashboxes.

The honor system is based on two very basic precepts. It assumes that people who are treated with dignity and respect will deserve the trust that is placed in them. It also assumes that in a profit-sharing enterprise, honesty and dependability will thrive, since whatever money is saved by the company will return to the employee. Moreover, employees who devise new procedures or innovative adjustments in their work areas which save the Company time and money, or improve its products, receive formal recognition in Tektronix publications and at meetings. At Tektronix, one third of all Company profits go into the profit sharing system. Last year, the profit sharing plan added to each employee's salary about 25% of his or her base pay.

Still another mechanism which facilitates employee trust in the organization is the Area Representative activity. Area Representatives are chosen by employees in specific geographical areas of the Company. They have two primary responsibilities: to help employees to gain a greater understanding of the Company, its organization, its products, its policies, and its employee development programs; and to serve as a communication linkage between employees and high level management. Employees and their Area Representatives arrange activities on a monthly basis which enable employees in one area of the plant to visit other areas of the Company, or which enable employees to meet with key people who can answer questions about a critical issue or program. Area Reps can also convey questions or suggestions to groups of managers or directly to the Corporate Group. Because Area Representatives are the employees' elected peers, they are in a position to judge

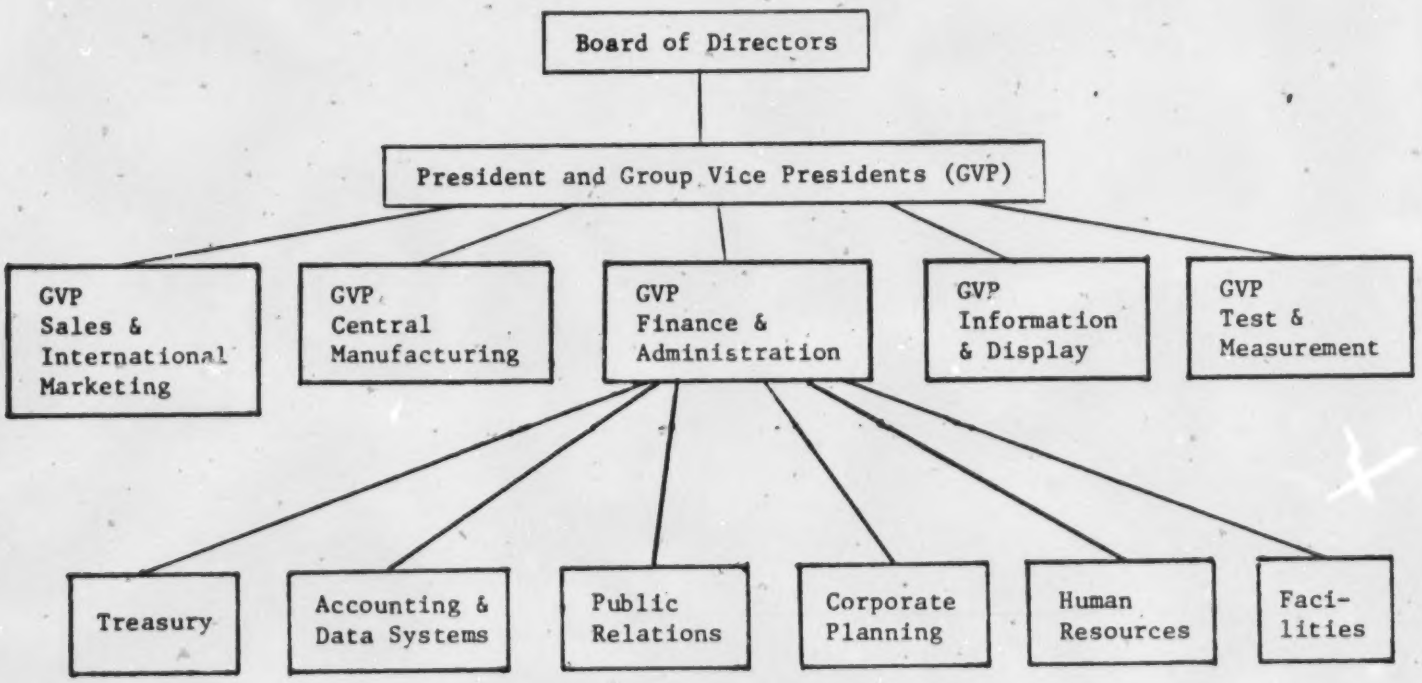
whether a certain question or suggestion should be conveyed directly to the president and Corporate Group or whether it should be handled at another level. Since these Reps must be elected every 11 months, a large number of employees have the opportunity to take on this kind of responsibility. The Reps may spend 8-10 hours of their normal paid work time each month on this activity. Last year there were 280 Area Representatives at Tektronix, and in the ten years the system has been in existence there have been over 3,700 Area Representatives. In addition to the Reps, there are Panel Members, who are elected by the Reps and spend from 60-100% of their time coordinating Area Rep activities. These Panel Members charge their time to the President's Special Fund. Last year there were 12 Panel Members, and in the last ten years there have been 160 people who have served on the Panel.

Obviously, the large corporation Tektronix is today cannot possibly achieve the kind of effective informal communications system which was present 30 years ago when the firm was still a small business. However, the Area Representative system is a clear example of how the Company has endeavored to maintain an open network of communications as it has grown over the years beyond the expectations of its founders. The original values are still intact, and, without understanding these values, it would be impossible to address the concept of career change at Tektronix, how it has worked in the past, and how it is changing to meet the needs of an expanding workforce whose members are often younger with less exposure to Company norms.

3.0 ORGANIZATIONAL STRUCTURE AND STAFF

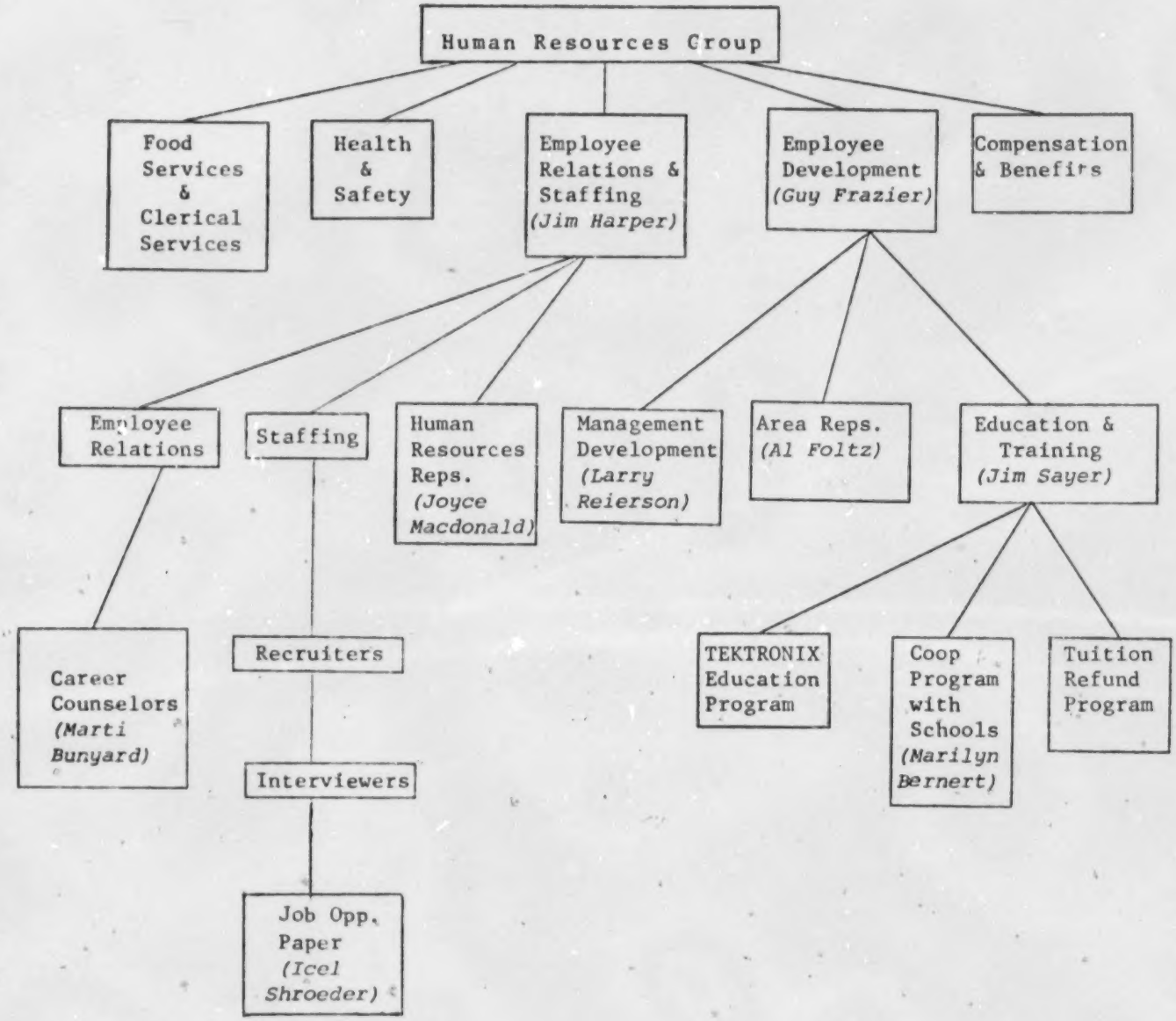
Most of the mechanisms which will be discussed in this case history come under the jurisdiction of the Human Resources Group which is a branch of the Corporate Group for Finance and Administration. Finance and Administration is one of five Corporate Groups reporting to the President and Board of Directors of Tektronix. Chart I presents the 1977 higher organizational structure into which the Human Resources Group falls.

Chart I



The Human Resources Group is in turn divided into five major areas. We will be primarily focusing on two of these areas here, namely Employee Development and Employee Relations. Chart II presents the 1977 organizational breakdown of those areas we will be discussing in depth.

Chart II



The names mentioned in the above chart are those of people we interviewed. The information received from these individuals, along with the feedback we elicited from employees, makes up the bulk of this case history.

The total Human Resources Staff numbers 480 people. Where available staff numbers for specific programs will be given in the Program section of this case history.

4.0 FUNDING AND RESOURCES

Although exact figures are not available, Jim Sayer, Manager of Education and Training, estimates that Tektronix spends some $5 million on all Human Resources Programs. Of that $5 million, he estimates the Education and Training budget to be about $1¼ million. More important, however, is Jim's statement that he has never had to refuse any reasonable employee request or cut back on any significant program ingredient due to financial concerns. And this includes incidentals such as reimbursement for child care when this is necessary in order to facilitate class enrollment for women and minority employees.

Facilities and equipment at Tektronix are both ample and well utilized. Classes are not only held in the modern Education and Training building,but anywhere else in the plant where appropriate space is available.

Turf problems seem to be non-existent at Tektronix. Often areas of a lunchroom will be blocked off for short courses or workshops given during the day. Rather than arousing resentment from other employees, such arrangements encourage employee curiosity and often advertise education offerings more effectively than brochures or advertisements in the Company newspaper.

Readers who wish to see a more specific breakdown of Company finances are referred to Tektronix' annual report for the fiscal year 1976-77. This report is listed in Section 8.0 of this case.

5.0 MECHANISMS FACILITATING EMPLOYEE CAREER MOBILITY

Although there is no comprehensive process by which any Tektronix employee can prepare for and enact a major career change within the Company, there is an evolving process, including several formal and longstanding mechanisms, which has clearly enabled thousands of employees to move both within and outside of their normal career progressions. That process includes the following formal and informal components:

- -- traditional informal career discussions with the employee's manager or an equivalent;
- -- pilot programs to make career counseling more formal and accessible to employees;
- -- formal education and training offerings, as well as educational counseling;
- -- an expanded job posting system.

5.1 Informal Career Discussions

Discussions with managers have traditionally been dependent, for their quality and frequency, upon the initiative of the individual employee and the receptivity of the individual manager. Although the "family" type atmosphere of Tektronix tends to foster such employee-manager conferences, it must be assumed that there are instances when employees fall short on initiative and/or when managers lack the interest and human relations skills needed to insure productive career discussions. However, the informal communications system at Tektronix has frequently compensated for the liabilities of individual managers. It is common for employees to seek out career counseling or job related discussions with anyone

in the Company with whom they have established rapport. This person might be a previous or potential manager, an administrator for human resources, an area representative, or another employee with extensive knowledge of the company. Often employees have approached Jim Sayer and others on the Education and Training staff. In fact, Education and Training is viewed by many employees not only as a place to take courses, but also as a place where individuals can clarify both educational and career goals.

Such informal counseling is as effective as the employee and the "counselor" make it. Should the rapport between the two be deep enough, personal problems and life planning concerns may be explored. More often than not, however, such informal counseling focuses on how the employee can improve his or her job or prepare for a more satisfying job within the Company. It is a straightforward, company-based approach, and usually results in some concrete suggestions the employee can immediately put to use. Such suggestions might include resume writing, attending classes to learn new skills, speaking with a key person not previously known to the employee, or approaching the present manager in a manner the employee had not thought of. Often, the "counselor" will set up appointments for the employee with managers in an area of the Company where the employee would like to work. In his counseling efforts, Jim Sayer frequently takes employees on tours through the Company and introduces them to managers and employees in areas in which they have expressed a sincere interest.

Although the informal system of career counseling has worked well and will continue to work well for employees who have sufficient

initiative and knowledge of the Company to make it work, it cannot be expected to work effectively for many of the Company's newer employees. Knowledge of such an informal system spreads primarily by word of mouth, and the more people involved in the system the harder it is for a non-initiate to find the appropriate contact when he or she needs it. Recognizing this, Jim Harper, Director of Employee Relations and Staffing, along with others on his staff, have initiated several pilot activities designed to make career planning more formal and more accessible to employees whom the informal system has not been reaching.

5.2 Toward A Formal System of Career and Life Planning

Although Tektronix may be starting later than many progressive firms in developing a formal career and life planning process, in many respects the Company has much more to build on than the majority of the conceptual leaders in the field. Whereas most firms are in the process of implementing new strategies, Tektronix is in the unusual if not unique position of clarifying and refining a process that has existed for years.

The challenge presented by this need for organization in the career planning process should not be underestimated, however. Many of the mechanisms which have been developed over the last two years still lack the visibility necessary to insure full employee utilization. On the other hand, those really needing career planning activities -- women, minorities, and severely dissatisfied employees -- are the people who have benefited most from these innovations.

One of the first of these innovations was the creation of the Human Resources Representative position a year and a half ago. Initially, five full time positions were created, each one assigned to represent one of the five corporate groups. Although the HR Reps report to the Director of Employee Relations and Staffing, they have the full support of their respective Group Vice Presidents and Division Managers. The President of the Company is also a strong supporter of the Reps.

Human Resources Reps are primarily facilitators and linking agents between individual employees and administrators within their Corporate Group. They function as the primary touchstone for resolving questions and problems which the employee has not been able to resolve with his or her manager. They are responsible for referring employees to the person within the Corporate Group who can best address the employees' specific needs. They perform a substantial counseling role as well, meeting with employees and line managers frequently to anticipate personal or interpersonal difficulties, job dissatisfaction and career confusion. Since they frequently function as interpreters of Company policy, they must also devote time and energy toward developing rapport with and eliciting responsiveness from top administrators.

Joyce Macdonald, a Human Resources Rep whom we interviewed, reported that she had met with about one third of the employees and one half of the managers within her Corporate Group. Of the four to five hundred employees who had come to her with a problem, over one hundred needed counseling concerning their careers at Tektronix. Most of these individuals required only a couple of

sessions to clarify their career directions. A handful required intensive career counseling. These individuals were referred to Marti Bunyard, one of the two counselors at Tektronix.

Marti was hired ten months ago because of her expertise as a Career Counselor. Previous to this, the emphasis at Tektronix had been on personal, family, drug and alcohol counseling. In hiring Marti, Tektronix was acting on its policy decision to build a full scale, formal career and life planning component from its already existing informal counseling activities.

One of Marti's first activities was to hold training workshops in career counseling for the Human Resources Representatives. As a result of that training endeavor, Joyce Macdonald and the other HR Reps are able to do first phase career counseling with their clients, as well as to decide when one of their clients is in need of a referral to the Career Counselor for in-depth sessions. The process which has emerged to date involves the following steps:

1. employee initiated discussion with manager;
2. employee or manager initiated discussion with a Human Resource Rep, often including first phase career counseling;
3. referral from Human Resources Rep to Career Counselor for intensive counseling.

Another less formal but equally productive source of referrals to the Career Counselor is Icel Shroeder, the Coordinator of the Job Opportunities System. All employees who apply for a job they see listed in the Job Opportunities paper must submit an application to the Coordinator. As a result, Icel often notices that certain employees are applying for positions indiscriminately. They are in the Job Opportunities office every week and are constantly

being turned down for new jobs because they do not meet the requirements for the positions they are seeking. When Icel notices this phenomenon, she will usually initiate a preliminary career discussion with the employee involved. More often than not this discussion results in a highly warranted and appreciated referral either to a Human Resources Representative or to the Career Counselor.

Surprisingly, these referrals happened spontaneously and were not the result of a conscious design by Marti Bunyard or her colleagues in Employee Relations. Both women were simply working in the same building, realized that their job responsibilities overlapped, and, after developing rapport with and respect for each other, began working together smoothly and effectively.

One of the biggest problems Marti Bunyard has had to face in her ten months at Tektronix has been her lack of time to devote to career counseling. Although she was hired bacuse of her expertise in this area, she is still required to function as a personal counselor in order to meet the client demand. Training of the HR Reps certainly helped to enable her to spend the most time with those clients most in need of career counseling, but even this adjustment proved to be inadequate. On an average, Marti holds twenty individual career counseling sessions per week. In addition to this, she runs four weekly career counseling groups involving about fifty participants. This facet of her total responsibilities is in itself a full time job. Add to it personal counseling responsibilities, and the constant need for long term planning to design a total career counseling approach, and you easily demonstrate the need for additional career planning personnel.

This need is being addressed in part through Human Resource Rep programming. For example, Achieving Your Potential, a two day workshop purchased from Pacific Institute, involved participants in career and life planning exercises. Next year, this workshop will be offered by demand. Employees selected by their managers to participate will take the workshop on Company time, but the workshop will be available to all other employees who wish to take it on their own time.

Another series of workshops, entitled Focus on Choices, has featured speakers and panels dealing with Career and Life Planning and related subjects such as Assertiveness Training, Increasing Job Options, and Personal Goal Setting. This program has involved over 250 employees each time it has been offered. It is a full day program and is offered off-site.

The Upward Mobility Program is still another example. An informal group, composed primarily of women and minorities, Upward Mobility features regular seminars responsive to the concerns of its members. Once again, Career and Life Planning emerges, this time as a Company designed seminar juxtaposed with other topics, such as Non-Traditional Jobs for Women.

The seminar approach has also been utilized by Marti Bunyard, who taught a Career and Life Planning Course in the Tektronix Education Program. One woman employee we interviewed was able to ascertain her need for in-depth individual career counseling after participating in this course.

Larry Rierson and his Management Development Staff have also been working diligently to incorporate Career Planning Training in

their Management Training Program. This will happen this year under the supervision of Don Floren who has designed a career and life planning course specifically for management trainees.

Even the Compensations Department got involved in the Career Planning arena when several of its staff members decided that it was important to devote staff time to research the process by which Tektronix employees move upward and laterally within the Company. Seventeen functional areas and career families were identified and all non-exempt jobs in those areas were described and evaluated based on interviews with employees and managers. This research culminated in a Career Path Booklet which can be used by Human Resources Reps, Counselors, Interviewers and others doing some sort of career counseling. A simpler version of this Booklet will soon be developed for use by managers. A similar career path publication will result from the current evaluation of all exempt jobs at Tektronix.

The degree of involvement with career planning concerns at Tektronix is clearly impressive. Time and energy are being invested by individuals and occasionally whole staffs throughout the Human Resources Group. The challenge which Tektronix now faces is that of integrating divergent assumptions about and approaches to career planning into a company-wide career planning system. Organizational difficulties should be expected and the question "Who has overall responsibility for the conception and implementation of Career Planning at Tektronix?" must be answered.

At the present time, Jim Harper, Manager of Employee Relations and Staffing, is playing a key role. In our interview with him,

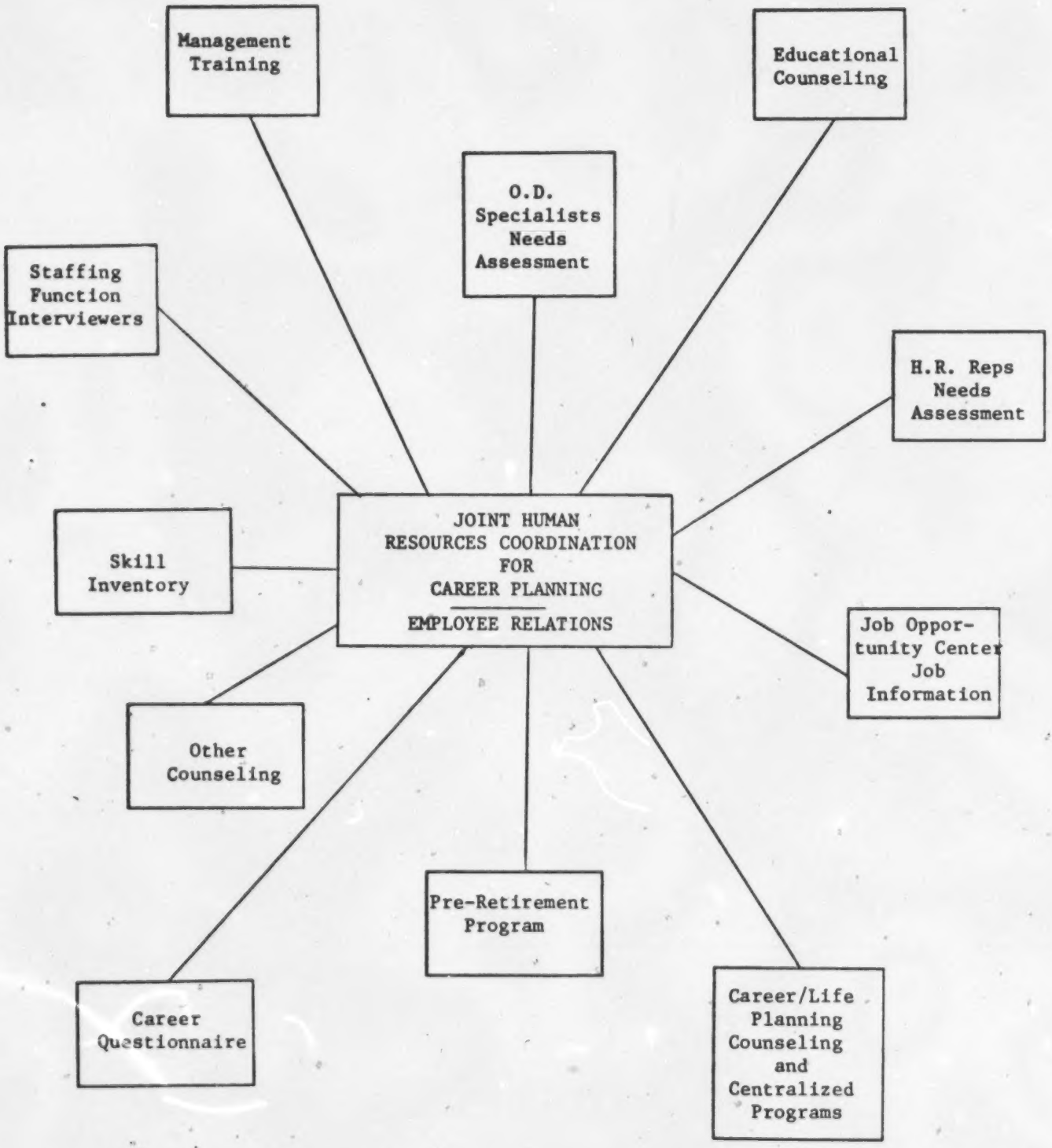
Jim indicated that one of his major responsibilities in the next few years will be to develop a Joint Human Resources Coordination system for Career Planning at Tektronix. A Special Task Force is already addressing this major challenge. Chart III, on page 21, indicates the operative components that need to be brought together if such a system is to be created.

One joint coordination activity which should be mentioned is the development of a Career Questionnaire, based on the Weyerhaeuser model. This optional questionnaire was distributed to all Tektronix employees at the beginning of the present year. Employees were told that their assistance in filling out the questionnaire would help their managers to become better aware of the employees' career goals. They were also asked to indicate whether or not they wished to have a copy of the questionnaire placed in their personnel file.

In spite of the open ended nature and brevity of the questionnaire (only 2 pages long), only about 12% of Tektronix employees responded to the survey. According to Jim Harper, the chief reason for the low response was that most managers did not encourage their employees to fill out the questionnaire. Jim also felt that managers should have been given better instructions about how they could best use the questionnaire with employees, whether they elected to use it on a spontaneous basis or during performance reviews.

Although the Career Questionnaire was not considered as successful as it could have been, it clearly underscores a facet of career planning that Tektronix needs to address more thoroughly. Tools

Chart III


Management Training
Educational Counseling
O.D. Specialists Needs Assessment
Staffing Function Interviewers
H.R. Reps Needs Assessment
Skill Inventory
JOINT HUMAN RESOURCES COORDINATION FOR CAREER PLANNING
EMPLOYEE RELATIONS
Job Opportunity Center Job Information
Other Counseling
Pre-Retirement Program
Career Questionnaire
Career/Life Planning Counseling and Centralized Programs

such as the questionnaire are invaluable when they are introduced to managers in conjunction with an orientation to career counseling techniques. However, unless managers understand how career planning can help them manage their employees more effectively, they cannot be expected to respond enthusiastically to such tools, especially when they require additional paperwork.

In this respect, Tektronix is experiencing the same "growing pains" as other companies striving to establish a unified approach to career and life planning. Typically, the more innovative managers respond wholeheartedly to the philosphy of career planning, whereas managers who are set in their ways tend to resent it. At Tektronix, this type of polarity may not be as obvious as it is in other firms, but it does exist. Perhaps a better way of describing the phenomenon at Tektronix is to say that most managers believe in some sort of career counseling, but that some believe that they should be able to do it in their own ways, whereas others are more willing to be trained and guided by professional career counselors.

At any rate, management participation in Career Planning training sessions is clearly needed if the Company is going to be able to develop a unified approach to the subject. Training of potential managers will certainly have an impact, but it is not enough by itself.

Fortunately, Jim Harper and the Task Force have the complete support of Norm Silver, Director of the Human Resources Group, as well as that of other high level administrators. With such support, it is only a matter of time before the Company creates a unified approach to career planning which will do justice to its other more sophisticated mechanisms facilitating employee career mobility.

5.3 Education and Training Program

Education and Training Programs at Tektronix have achieved a degree of responsiveness to employee concerns which is, to our knowledge, unparalleled in other firms. One of the key reasons for this vitality is the original emphasis placed on education and employee development by the founders of Tektronix. When the Company was still in its infancy, all employees were encouraged to learn as many jobs as they possibly could. The more an employee knew about the total process of building oscilloscopes the more opportunity he or she had for career advancement. It was common for employees to move from low level positions into administrative and/or technical jobs. Individual initiative and commitment to the Company were considered far more important than formal education and training. During the fifties, when the Company was undergoing the first phase of its rapid growth, Tektronix always looked within its own ranks -- to its janitors, stockworkers and production personnel -- in order to meet its workforce needs for technical, scientific, and administrative personnel. Many employees with exemplary motivation and commitment were given the opportunity to take technical courses at Tektronix's expense. By 1961, this option was exercised by enough employees to justify the establishment of a formal Education and Training Department.

From 1961 on, Education and Training has steadily expanded its offerings to employees. In the process, it has become a clearinghouse and drop-in center for any employee who is exploring career development and job change options within the Company. In talking with Tektronix employees we were given the impression that

Education and Training has something for everyone in the Company, whether this might be a combination of educational and career counseling, an avocational course, a technical course, or an on-site degree program.

The Education and Training Department operates three major programs and several adjunct services. The three major programs are:

-- the Tuition Refund Program;

-- the Tektronix Education Program (TEP); and

-- the Cooperative Education Program.

The Tuition Refund Program applies strictly to courses taken by employees at educational institutions in the community. Employees are reimbursed 100% for job-relevant courses and 50% for all other courses (with a few exceptions, such as crafts and gym courses). The decision as to whether a course is job-relevant or not is made by the employee's manager. Most managers consider a course to be job relevant if it is related to some Tektronix job opportunity, whether or not this opportunity exists in the employee's present employment area. For example, a maintenance person who wants to take an electronics course may be granted 100% reimbursement, whereas he would be awarded only a 50% refund for a history or an English course.

Employees in the Tuition Refund Program who complete a course eligible for 50% reimbursement receive this taxable refund in their regular pay. Those who complete a 100% refund course receive a separate non-taxable reimbursement check. In the 1976-77 fiscal year, 1,692 tuition refunds were earned by 1,024 employees. Of those, 1,142 were 100% refunds and 550 were 50% refunds.

Employees in the Cooperative Education Program receive the same percentages of tuition assistance. Unlike the Tuition Refund Program courses, however, Cooperative Program courses are pre-paid and participants are charged for non job-relevant courses out of their regular pay. Although tuition assistance is central to both programs, the Tuition Refund and the Cooperative programs are considered separate entities because of the difference in payment arrangements.

Total tuition assistance statistics must, therefore, include the prepaid course enrollments of the 634 participants in the Cooperative Education Program. Tuition assistance was, therefore, given to 1,658 individual employees for college or community college courses in the 1976-77 fiscal year.

The Tektronix Education Program (TEP) involved another 4,686 individuals and resulted in 7029 more course completions. Unlike the courses offered on and off site by colleges and community colleges, TEP classes are non-credit, offered on a pass/fail basis, and usually taught by Tektronix employees. 406 courses were offered in the last fiscal year. These classes range from highly technical subjects to general development subjects (such as the career and life planning course mentioned earlier). The following general categories will provide some idea of the variety of courses offered:

- -- orientation courses
- -- electronics courses
- -- physical sciences
- -- materials and processes
- -- data processing and computer technology
- -- communications skills
- -- business courses
- -- offices skills
- -- general development courses
- -- program instruction courses

The courses cost about $10 each plus books, and may qualify for Continuing Education Units (CEU).

TEP courses offer the employee the opportunity to explore his or her interests, to find out more about a new career area, or to actively prepare for a specific job within the company. Although advanced courses may have prerequisites, an employee can enroll in any of the numerous introductory courses regardless of his or her educational or job background. As can be seen from the above statistics, enrollment in the TEP classes was three times as great as that in the other two programs combined. In fact, more than one-third of all Tektronix employees at the home plant participated in TEP classes.

One of the reasons for this high participation rate is probably the informal and non-threatening nature of the courses. Employees are able to learn both with and from their peers. As a result, they are not faced with the depth of self doubt and insecurity that often accompanies adults returning to the classroom after long absences from it. For some participants, TEP classes can be a stepping stone to other academic and career achievements. Once they know they can do well in Company courses, they may gain the confidence to set more challenging career goals for themselves, to use the job posting system more frequently, to be more assertive with their managers, or even to enroll in one of the cooperative degree programs offered on-site. But, whatever the specific result of TEP participation, the growing enrollment in the program suggests that the TEP Program is a central force behind the phenomenon of career mobility at Tektronix.

The Cooperative Education Program provides an excellent example of how a company can work with a wide variety of community educa-

tional institutions in order to make degree programs readily available to its employees. Tektronix's first cooperative experience took place in the fall of 1960, when the State Department of Continuing Education, in an effort to make credit courses available in the community, responded to a Tektronix request for on-site classes. Only a handful of classes were offered at that time and were soon discontinued, primarily because area schools were displeased with the intermediary role being played by the state agency. After that, educational institutions showed very little inclination to offer courses at community locations. Like most schools throughout the nation, Portland colleges and universities were devoting most of their resources to programming for the young adult student.

The one exception to this trend was Portland Community College, which was established in 1959. In 1963, Tektronix employee Jim Sayer, now Manager of Education and Training, went to Portland Community College to teach technician courses because of the Company's crucial need for trained technicians. Jim taught full time at the college for about three years and, in the process, developed a close working relationship with Amo DeBernardis, President of the College, as well as with faculty members and other administrative personnel. By the time Jim returned to Tektronix, Portland Community College's enrollment had jumped from 4,000 to 25,000 students and the College was planning to establish another campus. At this point, much of the cooperative focus for both Tektronix and Portland Community College was on negotiations for a Washington County location of the satellite campus. In 1975, a favorable decision was reached and Portland Community College established a Washington County campus, just a few miles from Tektronix.

The proximity of the new campus encouraged greater numbers of Tektronix employees to take advantage of the Tuition Refund Program. Cooperation between the College and the Company continued to deepen and, in 1970, Portland Community College agreed to offer classes at the worksite.

By that time, other educational institutions in the Portland area had begun to concentrate on expanding continuing education offerings in order to attract adult students. Since Tektronix is the largest private employer in the State, schools were anxious to cooperate with the Company's Education and Training Department. Before long, Tektronix was able to work out arrangements for on-site degree programs with several other area higher educational institutions. These have included Maryl Adult Learning Center, Portland State University, University of Portland, Oregon State University, and the Oregon Graduate Center.

As of this year, the following degree programs are offered as part of Tektronix's on-site Cooperative Program:

-- AA in Management/Supervision from Portland Community College;
-- BS in Electrical or Mechanical Engineering from the University of Portland;
-- MS in Electrical Engineering from Oregon State University;
-- MS in Computer Science from Oregon State University;
-- MS in Electronics Science from the Oregon Graduate Center;
-- BBA from the University of Portland; and
-- MBA from the University of Portland.

In the last fiscal year, 634 employees participated in these degree programs and 86 more employees audited courses within them. Eleven employees graduated from their programs, nine of them receiving MBA degrees and two receiving BSEE degrees.

Although the Tuition Refund Program, the TEP Program, and the Cooperative Education Program represent the major portion of Education and Training offerings, other special programs and general services must be mentioned. One of these is an industry experience program by which faculty from area engineering schools spend summer months working at Tektronix in order to stay abreast of the latest technical processes and equipment. Students from Pacific University, through a work experience program, participate in similar internship activities. Moreover, arrangements are now being made to expand a faculty inservice arrangement with Portland Community College and other non-engineering schools. At present, two Community College faculty are working at Tektronix, but in the future Tektronix plans to create 30 full time positions, which will be staffed by faculty members from area schools on a rotating basis. Plans for faculty-employee exchanges have been discussed, but have not received the support of faculty members, who believe the arrangement might jeopardize their jobs. However, in spite of the lack of a formal exchange, many Tektronix employees have taught in the Portland Community College evening program. These examples of employer-educator cooperation help to make on and off site college courses more responsive to employee needs.

Other specific in-house training programs have been created to facilitate the upward mobility of women and minority employees. The Management Training Program, for example, has focused intensively on recruiting women participants, and last year over 50% of the trainees were women employees. A special Crafts Training Program will involve 73% women and 10% minority employees. This eight week full time program is open to anyone with his or her manager's

approval and will enable 48 employees to upgrade their skills to apply for technical positions (many of them non-traditional positions for women) each year.

Several operating areas also offer non-traditional training for women. The Test and Measurement Division, for example, offers a 600 hour program which qualifies participants -- 70% are women -- to be electronics technicians. Half of the training takes place on Company time and half on the employee's time. Still another example is the four year air conditioning training program, which qualifies its graduates to be senior maintenance persons. 50% of the participants in this program are women.

Such non-traditional training opportunities for women are given high priority at Tektronix, and rightly so. 45% of all Tektronix employees are women. It is no surprise, then, that many of the more dramatic job and career changes at Tektronix are being made by women employees.

In addition to the variety of training opportunities offered by Education and Training, the Department also provides educational counseling; GED, CLEP and other educational assessment testing; and educational loans. It also maintains a modern library housing 10,000 volumes, 450 periodicals, and information and data bank services. The Department employs 13 full time staff members, including the Department Manager, the TEP supervisor and three coordinators, three education specialists, a graphic artist, a program instruction coordinator, an administrative secretary, and a machine shop instructor. Approximately 125 additional persons are employed part time as instructors in the TEP Program.

5.4 Internal Placement and Outplacement Procedures

As mentioned before (see Section 2.0, page 2), the primary internal placement mechanism at Tektronix is the Job Opportunities Program. This program includes weekly job posting through the "Job Transfer Opportunities" newspaper, an eight page publication prepared by the staff of the Employee Relations and Staffing Division. The paper lists and describes in detail all job openings in the Company. All jobs listed include pay range scale designations. The paper also includes a completed application and one page resume, which applicants can use as models in preparing their own applications and resumes. Employees who are uncertain about how to apply for jobs or who have questions about the interview and transfer process are referred to the Job Opportunity Center for assistance.

Once an application has been submitted to the Center staff, it is reviewed and usually forwarded to the manager in whose area the open position exists. Employees who are obviously not qualified for positions for which they have applied are notified by the Center staff that their applications have not been forwarded. In most cases, however, applications are reviewed by the manager and interviews are arranged. After the manager has interviewed applicants and made a determination, he or she is required to notify all applicants of his or her decision and the reasons on which it was based. Managers are also required to document the dates on which interviews and notifications take place.

The Job Opportunity Center processes some 250-300 job opportunity transfer applications each week. These applications result in approximately 200 job transfers per week.

Some employees may have moved around the Company enough to know that they cannot find career satisfaction at Tektronix. Others may desire to rearrange or decrease their work hours so that they can devote more time to an avocational pursuit or to preparation for a new career. Although the Company has responded to such instances individually, it has generally assisted long-standing employees to pursue individual development plans that are non-Company related. Suppose, for example, an employee desires to become an elementary school teacher. The Tuition Refund Program will pay for 50% of many courses the employee takes toward that goal, even though elementary education courses have no relation to jobs at Tektronix.

Moreover, that employee might be granted a forgiveable education loan in order to pursue such studies. The loan, which is intended for employees taking company-related courses, has occasionally been granted as a kind of reward to longstanding employees who desire to prepare for jobs outside the company. Managers will usually do everything that they possibly can to assist employees who have served the Company long and well. There have been several occasions when individual managers have approved a reduction in work hours without a reduction in pay for a particularly deserving employee. In other circumstances, managers have actually created jobs to match the abilities of a specific individual, rather than lose that person's special talents. Such arrangements are a tribute to the contributions made by employees to the Company. They do not result from a formal policy, but from the traditional Company belief that what the employee gives to

the Company should come back to him or her before the employee leaves Tektronix.

Because, in the past, the majority of Tektronix employees have considered employment with the Company a life-long career, the Company has traditionally viewed retirement as a gradual process that makes adjustment as subtle and as comfortable for the employee as is possible. This longstanding Company attitude certainly makes Tektronix fertile ground for pre-retirement planning activities. However, with the Company workforce increasing steadily, a more formal pre-retirement process which is visible to all employees becomes more and more necessary. Top Tektronix administrators recognize this and pre-retirement planning is seen as a significant ingredient of the career and life planning system now being developed. The tuition free pre-retirement classes, which have been offered through Education and Training for employees and their spouses, are a first step in this direction.

6.0 EXAMPLES OF CAREER CHANGERS

In the course of our site visit at Tektronix, we interviewed nine employees. Seven of these individuals have changed careers within the Company, one has been doing the same job for 16 years and still loves it, and one individual recently left the Company after several frustrated attempts to secure a position in a desired area. Together, their individual career experiences provide a representative picture of the type of career mobility that exists at Tektronix.

Sarah has been at Tektronix for twenty years. She began as a production worker, and four years later moved into quality control, a typical career progression. But she wasn't satisfied with her job. She wanted more of a challenge as well as more autonomy. She decided to learn drafting skills in order to qualify for a new position. She took courses in drafting, mathematics, and circuit board design through the TEP program and began checking the job postings for drafting positions. However, openings in drafting were scarce, and when an opening in the circuit board design area was posted Sarah applied for it and was hired. She has been working in the circuit board design area for the last five years and is still pleased with her job. She may apply for a drafting position, should one arise in the future, but for now she is satisfied with the autonomy and chailenge which her circuit board design job gives her.

Jerry also works in the circuit board design area. A much younger person, with only four years in the Company, Jerry began his Tektronix career as a part-time temporary. He immediately began taking technician level courses through the TEP program and soon secured a job in the Transformer Department. He then began to clarify his career goals and determined electronics as his primary interest. Again, he took TEP courses, this time in circuit board design, and soon found a job in this new career area. He was enthusiastic about his work as a circuit board designer. He enjoyed the technical challenge, but, even more important, he appreciated the flexible hours, the relaxed working atmosphere, and the sincerity of his manager. All of these attibutes had been

missing in his earlier jobs. In fact, Jerry did not hesitate to express his opinion that managers in production areas were simply not as responsive to or as concerned about their employees as managers in the more skilled technical areas.

Ted, who supervises both Jerry and Sarah, has worked as a circuit board designer at Tektronix for 16 years. He has had quite a few opportunities to move into higher level positions in his career with the Company, but has consistently reaffirmed his present career choice. At one point, Ted did consider a higher level management position, but he soon realized that his strength was in working with people in an advisor-mentor role, not in managing others. He was quite emphatic about his disinclination for the disciplinary role managers inevitably have to assume. Instead, he had found a way to exercise his leadership abilities by teaching regular classes in circuit board design through the TEP Program. By doing this, he had been able to assist many employees like Jerry and Sarah to move into more fulfilling and challenging jobs within the Comapny. Ted is proud of being one of the best circuit board designers at Tektronix. He is also proud of his abilities as a teacher and mentor. The enthusiastic response of students to his course over the years has given him the kind of psychological support he feels he could not have earned as a manager. Besides, Ted loves his job. For him, having the opportunity to change careers and not taking it has been as conscious and rewarding a decision as career advancement or career change has been to other employees.

Mike came to Tektronix in 1965 as an engineer. He was one of the first students in the cooperative MBA Program. Even though administration was not his present career area, Mike received 100% tuition reimbursement for participation in the degree program. After graduating with an MBA degree, Mike moved out of engineering into a series of administrative jobs. He is now in the position he most desired. Mike is the Corporate Economist for Tektronix.

Julie has been with the Company for 12 years. She worked for a year as a switchboard operator, and then applied for a secretarial position in the Company library. She was hired for this position, which, to her surprise, gave her an opportunity to take major responsibility for operating the library. Before long, the librarian left the Company, and Julie began operating the library herself. Because of the skills she had acquired on the job, Julie was able to meet the responsibilities of her position to everyone's satisfaction. As a result, the Company decided not to hire another librarian. Julie was so pleased with her new career that she determined to go back to school for formal training. With 100% tuition reimbursement from Tektronix, Julie earned her Masters in Library Science. She is now Head Librarian for the Company and supervises three library staff members.

Roy has worked at Tektronix for 21 years. He worked in the formal assembly area for 14 years. When the Company closed his department in 1970, Roy took a calibration job in the test department. He was not satisfied with his new job and began discussing his career with his manager, who suggested that he talk with a manager in the facilities area. Roy received a great deal of

encouragement from the facilities manager and determined to take a course offered by Portland Community College so that he could prepare for a new career. He received 100% tuition reimbursement for this course and, when a job opened up in the facilities area, he applied for it and was hired. In order to move into facilities, Roy had to take a cut in salary. He expected that it would take him two years to advance beyond the salary range of his previous job. But, due to his high motivation, he surpassed his previous salary range in just six months. And, in less than two years, Roy was promoted to a senior maintenance position in the facilities department. In the process, he jumped from a range 7 salary level to a range 12 level.

Jim came to the Company as a janitor in 1962. He did well in his job and was eventually promoted to a custodial services management position. He was then responsible for 129 Company employees and 45 contractors. After working to organize this group into a highly efficient crew, Jim felt the need for another challenge. He decided on a lateral move and secured a position as a maintenance supervisor. While working in this new job, Jim suffered a heart attack. While he was recuperating, it became obvious that he would no longer be able to do the kind of physically demanding work he had been doing. When he returned to Tektronix, he looked for a position which would be mentally challenging without demanding much physical exertion. He was hired as a transportation coordinator and, using his ingenuity, he arranged with the city bus company to have regular bus routes through Tektronix property, and he helped design and implement a car

pooling system for Company employees. When he was satisfied with the effectiveness of transportation services, Jim looked for another challenge and subsequently made another lateral move, this time taking an office services manager position. He soon developed an improved system for servicing Company vending machines. And then, for personal reasons, Jim took a six month leave without pay. When he returned to Taktronix, Jim took a job as a tool crib attendant, a job lower in salary and seemingly lower in responsibility than his previous jobs. However, Jim soon disproved any assumptions that the attendant job was either menial or routine. When we interviewed him, Jim described to us the sophisticated system for lending and retrieving tools which he had designed and pointed proundly to the rows of metal cabinets with their carefully marked drawers. Neither the housing nor the paperwork system had existed before Jim had taken this job. And his broad smile told us that he was not only delighted with another time and money saving accomplishment, but also leisurely surveying the Company for still another challenge. We have every reason to believe that he has found it.

Not one of the seven employees whose careers we have discussed participated in any formal career counseling sessions or career and life planning workshops. They represent the informal process by which Tektronix employees change jobs within the Company. Most of these job changes were self-initiated. Often the employees involved received some kind of support or career advice from their respective managers; but it would be unlikely that their careers would contain the number or variety of job changes involved if the individual initiative of the employees had been lacking.

There are cases, however, when formal career counseling can make a big difference in an employee's career direction. Suspecting this, we intentionally interviewed two employees who had participated in recent career planning activities and career counseling sessions.

Jane has been employed at Tektronix for three years. She began working a swing shift in a production area and soon got bored with her job. She had little idea of what she wanted to do, but she knew that she had to find a different job. While attending one of her classes in psychology, Jane heard about Marti Bunyard, the Career Counselor, and approached Marti for help with her career problems. Her individual sessions with Marti helped Jane to develop confidence in her abilities and to gradually determine a career direction. Like many of Marti's clients, Jane went out into the Company and interviewed employees and managers to try to ascertain the type of job responsibilties and work setting that would come closest to meeting her needs. She also attended Upward Mobility seminars and received support from her peers in addressing family and work issues. As a result of this support, Jane secured a promotion to an inspector position in the production area, and is now a candidate for the management training program. She was quite explicit in saying that without Marti's support and guidance she would not have been able to develop the confidence in herself and in her career direction which she now has.

Kim, another one of Marti Bunyard's clients, recently left Tektronix after working in the Company for eight years. She began working in a production area and eventually moved into a position as an engineering technician. During her four years in this

position, she worked on a degree program in science at Portland State University, and looked for opportunities to move into a research position in the Company. After talking with managers in the research area, Kim became disillusioned and concluded that it would be unlikely that she or any woman would be able to compete against men for jobs in this area. She then went to see a Human Resources Representative, who suggested that Kim consider other non-traditional areas, such as sales and marketing, where managers were more open to women applicants. But Kim was resolute about her intention to work in a scientific field. Finally, after much questioning of her abilities and goals, Kim went to see Marti Bunyard. In her sessions with Marti, Kim was able to express her frustrations in dealing with the barriers that oppose women who desire jobs in scientific fields, not only at Tektronix but in the society as a whole. She was able to discuss her budding interest in law and political science, and to share her doubts about whether a science career would be worth the struggle she would have to experience in order to pursue it. She was also able to admit to herself that her career direction at Tektronix was only a small portion of a larger career choice she would have to make. Once she realized this, she knew that by remaining at Tektronix she was only putting off that decision. In her counseling sessions with Marti, Kim told us, she gained the courage to confront the choices available to her and to make a conscious decision about her future. Kim is now enrolled full time in a degree program in political science and plans to apply to law school as soon as she graduates.

All nine of the above examples represent typical employee career sequences. Many involve promotions, some involve lateral moves, and a few involve voluntary demotions. Most of the above individuals have experienced one or more career changes in the course of their employment at Tektronix, whether this change took place in a single job move, or as the result of a series of job moves. One case involves continual reaffirmation of a specific career area and provides us with a good example of how job enrichment can ensure the longevity of a career. Another case involves a decision to leave the Company, and accordingly shows how career changes cannot always be made within a company context, no matter how flexible or responsive that context is.

Many of the above examples reflect the informal career counseling system at work. Our last two examples show how a more formal and visible career counseling system can reach employees who, for their own unique reasons, need more in-depth and consistent career assistance than the informal system usually provides.

Moreover, all of the above examples reflect the effectiveness of the job posting system and the education and training programs in assisting individuals who want to make career changes within Tektronix. Without these two formal and longstanding mechanisms, career mobility would be minimal; because of them, Tektronix has a solid foundation upon which it can build a full scale career and life planning system for its employees.

7.0 FUTURE POSSIBILITIES: STRENGTHS AND WEAKNESSES

Future possibilities for increased employee career change options are largely dependent on the ability of the Joint Human

Resources Task Force to strengthen and coordinate the existing functions shown in the model (Chart III) presented in Section 5.2 of this case history. In our opinion, the area that requires the greatest support and coordination is that of career counseling information and services. More professional career counseling services are needed to meet the needs of employees. Such services could be generated by training managers in career counseling techniques, by hiring additional career counselors, or by building ongoing career counseling training and responsibilities into the job descriptions of those individuals now most actively counseling employees on an informal basis. But, whatever method of delivery is chosen by the Task Force, two results seem necessary.

1. a consistent, client-centered approach to career counseling, which insures reasonable caseloads for counselors while providing services to all employees who request them; and

2. maximum visibility for career counseling services, so that employees and their managers know whom to contact when a career counseling need is identified.

The difficulty of establishing a career counseling system such as this should not be underestimated. Many other firms may have conceived and pilot tested sophisticated career planning programs, but have yet to fully implement them.

However, the strength of career change activities at Tektronix is not in the area of formal career counseling services, but in the overall commitment of the Company to the continued growth and development of its employees. It is this commitment which has enabled the Company to come close to its goal of filling 90% of its non-entry-level jobs from within. And it is this commitment which has made career mobility a norm, and education and training one of the Company's highest priorities.

Other organizations can learn a great deal from the Tektronix experience. Even though the Company has grown tremendously in its thirty year history, it has continued to demonstrate the fact that mutual trust between employer and employee can flourish as long as it is valued by the organization. It is this faith in its employees, combined with its outstanding opportunities for employee self and career development, which make Tektronix a model for other firms attempting to meet the career needs of their employees.

8.0 REFERENCES

The following Tektronix publications contain additional information about the Company and its programs.

Tektronix, Inc. Annual Report, 31st Year, May 28, 1977.

Tektronix Employees' Handbook, 1977.

Area Rep Activity Guidelines, Revised May, 1977.

Career Paths in Non-Exempt Jobs, Salary Administration Department, May, 1977.

Tektronix Education Program Catalog, 1976-1977.

Tekweek, ongoing publication.